COMMUNITY ACTION PLAN

LIFT COMMUNITY ACTION AGENCY, INC.

Mission:

"To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency."

Purpose:

The purpose of this plan is to provide a roadmap or guide for decision-making process over the anti-poverty programs administered

Vision:

"To free generations of people from poverty."

EST. 1968

NeighborWorks® AMERICA

2020

Lift Community Action Agency

2020 Community Action Plan
LIFT Community Action Agency, Inc.

Purpose:

- The *CSBG Act 42 U.S.C. § 9908: US Code – Section 9908 Application and plan* requires "an assurance that the State will secure from each eligible entity in the State, as a condition to receipt of funding by the entity through a community services block grant made under this chapter for a program, a Community Action Plan (CAP) that includes a community-needs assessment for the community served, which may be coordinated with community-needs assessments conducted for other programs"
- The Community Action Plan (CAP) is ***outcome focused*** and describes the community-wide approach the agency will take when making decisions on the anti-poverty programs it will administer. The CAP should tie directly to the agency's most recent Community Needs Assessment, and document the full use of the ROMA cycle. *(Organizational Standards 4.2 and 4.3)*
- The CAP is a required, foundational element for CSBG funds and is a roadmap for implementing community changes – the CAP provides the focus and identifies the what, the who, and the how of these changes. The CAP notes the specific strategies and outcomes to show success.
- The CAP is the *annual operation plan* for the strategic plan (which is usually 3-5 years), and gets into more of the nuts and bolts of how the agency will actually achieve the goals set in the strategic plan. It should include everything that the agency plans to do – whether or not it is directly funded by CSBG. The CAP must, at a minimum, address all questions included within this template, but the agency may also include additional information as needed to make it an operation plan that is useful to the agency.

Introduction, Agency Mission and local theory of change

The CAP should start with a narrative introduction that includes the following:

1. An Executive Summary that briefly describes the plan's purpose and goals:

   The purpose of this plan is to serve as a guide over the next 12 months for ensuring that the work of LIFT Community Action Agency, Inc. (LIFT CAA) aligns with the CSBG Act as well as the communities needs as identified in the most recent 2019-2021 Community Needs Assessment and the 2020-2023 Strategic Plan.

   LIFT CAA's mission is*: "To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency."*

   The goal will be to focus resources towards achievement of outcomes identified in the C.N.A. report, Strategic Plan, Performance Management Outcomes excel workbooks and the FY20 logic models (all included as uploads). The logic models are representative of the communities' top three prioritized needs- Housing, Substance Abuse Services and Community and Economic Development.

LIFT CAA staff and Board will utilize existing resources and seek/secure additional resources in order to achieve the stated goals/objectives/outcomes. The ROMA coordinator will produce reports which will be shared with program staff on a monthly basis. These reports will help in evaluation of program services, identification of success rates and what, if any, revisions, are needed. Reports will also be shared with management, the Board of Directors and other Stakeholders no less than annually. Some reports such as Customer Satisfaction will be shared quarterly with the Board and uploaded as part of the CONFAX and/or within CAPTAIN (as applicable/required) to the Oklahoma Department of Commerce.

2. Brief description of the agency (basic information, size, etc.):

LIFT Community Action Agency, Inc. was founded in 1968 when three local Community Action Agencies merged in order to better meet the needs of families with low incomes who resided in any one of the three very rural and poverty-stricken Southeast Oklahoma Counties. LIFT CAA's primary service area includes Choctaw, McCurtain and Pushmataha Counties, a land area of over 4000 square miles with a population of 59,271. About one in four individuals in the service area are living below the Federal Poverty Limits. The 2010 Census reflects that 24% of the population lives below poverty.

The agency, headquartered in Hugo, Oklahoma (Choctaw County) provides a wide array of services ranging from education, housing, social services, emergency services to transportation and more all aimed at alleviating the conditions of poverty. Today, LIFT CAA is one of the top ten employers in the tri-county area with 244 full time staff and 62 part time staff as of January 31, 2020. The agency's annual budget is approximately $21 million and supports about 20 separate programs.

3. Introduction that describes the process used to develop the CAP and stakeholders who participated;

The CAP represents, in large part, an extrapolation of data from recent and relevant agency and community-developed documents which includes the 2020-2023 Strategic Plan; 2019-2021 Community Needs Assessment Report; 2019 Customer Satisfaction Data; and analyzed data from CAPTAIN and other program-tracking databases. The data contained within these documents represent actual client counts and demographics, survey responses, summaries from community and focus group discussion, etc. Therefore, the CAP includes both quantitative and qualitative data. Some sections of the Community Needs Assessment report (approved by the Board of Directors in January 2019) include qualitative data derived from interviews with Board members, service providers, residents, and front-line staff.

Stakeholders involved in the process of developing these documents included residents, staff, Board, other service providers, partners, and funders. The "key findings" that came out of these activities can be found throughout this 2020 Community Action Plan. LIFT CAA's 2020 CAP was presented to the Board for consideration, discussion and vote during the February 11, 2020 regularly scheduled board meeting.

4. Description of how the process addresses CSBG mandates, the organizational Standards and the ROMA framework.

   The process, as described in the previous section, addresses CSBG mandates, the Organizational Standards and ROMA framework inasmuch as it identifies development of the CAP by the overall community. The CAP was developed from the various documents developed at the community level, by representatives of each required community sector. This plan is outcome-focused and identifies needs as well as the type/level of need and strategies for how the agency will address these needs over the next 12 months. Each component is mission-focused and was developed as a collaboration of staff, customers, board and other stakeholders.

5. References the agency's mission statement and how it is used in guiding the agency's decisions, actions and programs.

   LIFT CAA's mission statement which reads "*To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency"* is the driver for all decisions and subsequent actions by representatives of the agency. The mission statement was approved by the Board in February of 2016 initially. It is reviewed annually and was revisited during the January 14, 2020 Board of Director's meeting. The Board members each reviewed the Mission Statement and completed a "survey" to determine if it met with the five criteria as set forth in the CSBG regulations/guidance. The bulk of programs/services provided by the agency are targeted to families of low-income. Most services require individuals/families meet low-income guidelines as an eligibility requirement. LIFT CAA is first and foremost, a Community Action Agency. Therefore, the very identity of the agency is founded in addressing causes and conditions of poverty.

6. Describe the local theory of change (if applicable) and how it is used in decision making and communication.

   LIFT CAA has not developed a formalized Local Theory of Change but the work of the agency centers around the National Theory of Change and the three National Goals. The agency's mission statement "*To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency"* makes the following assumptions: 1) We can improve lives; 2) We can help individuals and families become self-sufficient; 3) We need to collaborate with others to achieve the change.

   LIFT CAA utilizes information from reports, conversations with front-line staff, management, board members and customers to determine how best to meet the community's needs. This informal "theory of change" is reflected in the programs and services provided by the agency. The agency pursues resources (funding, volunteers, etc.) that would serve to address community-identified needs, all of which align with the National goals.

Assessment

This section should be in narrative format and include the following at a minimum:

1. Describe the community that was assessed (could be service area or other designation).
   The community assessed represents LIFT CAA's service area which includes Choctaw, McCurtain and Pushmataha counties. Collectively, these three rural Southeast Oklahoma counties have an average poverty rate of 24 percent (U.S. Census Bureau; 2010 Census). The population density is about 14.76 persons per square mile compared to the State's density of 56.5 persons per square mile. Currently, about 66 percent of the population is white; 7.62 percent black; 10.5 percent multiple races; 13.32% Native American with the remaining representing other races. Gender makeup is 51.07% female and 48.93% male. According to the U.S. Census 2010, the combined population was 59,928 and the 2018 Population estimates for this same area were 58,950 (Census American Factfinder 2018 Population estimates) representing a little more than a 1 percent decrease (1.6%) in population. Decreases are seen across each of the three counties (American Community Survey-2012-2016 five year estimates; U.S. Census). This area as described represents LIFT CAA's service area and also the community that was assessed for the most current Community Needs Assessment for 2019-2021.

2. Explain the agency's assessment processes including, community needs assessment and customer satisfaction
   The community needs assessment process began with collection of needs surveys. LIFT CAA utilized the Oklahoma Standardized Needs Assessment Survey for data collection. Surveys were conducted using paper and online formats. Paper surveys were distributed throughout the service area using various outlets. They were emailed to all staff and members of the Board of Directors. Paper copies were sent home with all Head Start and Early Head Start children, Healthy Start participants, and all Retired and Senior Volunteer Program (RSVP) volunteers. Agency staff distributed and collected completed surveys from area schools, faith-based organizations (Churches), civic groups, County Coalition members (which include representation from all community sectors), and more. Additionally, the survey was advertised via newspaper advertisements and through social media outlets.
   The survey contained a question for respondents to self-identify which sector best described them. The available options included: Client of the Agency, Agency Board Member, Agency Volunteer, Representative of an Educational Institution, Representative of a Government Entity; Representative of a Private Organization; Representative of a Faith-Based Organization; Representative of a Community Based Organization; or General Public (someone having not received services from the agency). Surveys were completed and received from all sectors listed. A total of 864 surveys were collected and entered into an online database using SurveyMonkey. This database then generated top

needs ranked in ascending order for the top 12 identified needs. The top ten needs were shared with focus groups which included; leadership, front-line staff and board members to prioritize the needs to the top three. During the prioritization activity, focus group participants were asked to provide "rationale" or qualitative data as to why they selected and ranked/prioritized the three needs chosen. Counts were conducted on each respondents completed surveys and the need referenced most was identified as the number one prioritized need and this process was used to identify the top three.

Once needs had been prioritized, LIFT Community Action Agency conducted six community meetings (two per county in each county within the service area) in order to gain additional input from residents, local services providers, staff, board, and other stakeholders on the prioritized needs and resources within the service area. These meetings were also advertised via email, newspaper advertisements, posters, and through social media outlets. Meeting participants engaged in activities of identifying causes/conditions of poverty, existing resources, gaps in resources, and potential strategies for addressing each of the three needs. All of this data was collected and utilized to develop the 2019-2021 Community Needs Assessment Report, which represents one of the documents used to develop this FY20 Community Action Plan.

In addition, customer satisfaction surveys are a tool used for developing the CAP and in decision making for agency programs/services. Customer satisfaction surveys are available on the agency website and paper copies are located/available at each LIFT CAA office location. Customers are asked to complete a survey upon receipt of services, preferably at that point in time. However, to facilitate participation and remove any potential barriers, customers are informed of the online survey tool and assured that their responses are completely anonymous and cannot have any impact on their eligibility for receipt of services.

Customer Satisfaction survey responses are entered into an online database and reports are provided to the board on a quarterly basis. Survey responses, when and where deemed necessary are shared immediately with appropriate staff. An example would be in the event a survey response revealed the need for further review and/or action. For example, if a respondent stated that staff did not seem knowledgeable of the program from which they sought services, those responses would be shared with the appropriate program director, Associate Director, and Executive Director. The information would be used to determine if additional training should occur within that department so as to ensure services were being provided as intended for that particular service. This is true across the board for all agency programs and services. The customer satisfaction survey is used as a tool to help guide the agency in decision making processes over staffing, training, services, service-delivery, etc.

A new strategy implemented for FY2020 is the development and use of a Matrix Questionnaire. This tool allows us to collect data on income, budgeting, transportation, household and childcare. Each answer is ranked on a scale of 0 to 10. For any customer

scoring two (2) or below, they are considered to be "In Crisis"; the other rankings 3-4 = At-Risk; 5-6 = Stable; 7- 8 = Safe; and 9-10= Thriving. Upon any client completing an intake for services in Credit Counseling, Housing Rental, Early Head Start – Child Care or Business Lending, they are asked to complete this Matrix questionnaire at the time of service. Then, through the process of case management, follow up questionnaires are completed by these same clients at a minimum of every 90 days for a period of one year. Internally, staff assess the data to determine if there is any correlation between those clients who show an improvement in one or more of the areas assessed and the level (frequency, duration or number) of services received. If one of these customers' situations improves, i.e. goes from crisis to safe or at-risk to thriving, etc. then we feel this supports our hypothesis that receiving multiple services leads to increased self-sufficiency. Additionally the Matrix Questionnaire allows front-line staff opportunities to identify client needs during each follow up and make referrals to eligible programs as applicable.

A feature within the CAPTAIN software, the Service Integration Matrix (SIM) will assess if the client is eligible for other services than those originally sought. The SIM is ran internally (CAPTAIN Administrator) on every client served and follow up is conducted with clients if/when the SIM identifies client eligibility or potential eligibility for other services. Currently, LIFT C.A.A. utilizes the Service Integration Matrix (SIM) to assist with case management. The SIM allows CAPTAIN users the ability to provide the client with additional services the client may be eligible for, based on the information reported. CAPTAIN data input staff can print and mail a computer-generated referral letter to the client. If the client is readily available, the letter can be given to them in person. This letter lists the possible services the client is eligible for and the contact information for those programs. By utilizing the SIM feature, LIFT CAA program staff have the opportunity to educate and provide individuals/families with as many services as possible, thus improving customers chances of achieving self-sufficiency.

Other tools for assessing agency programs/services include the Strategic Plan, CAPTAIN and other program databases that provide client counts, demographics on population served, outcomes for services provided, etc. These reports help to identify what services are most utilized; who is most likely to utilize agency programs, what, if any, outcomes are being achieved, etc. This type of information helps us better understand exactly "who" our clients are, what their needs are and is critical to the decision-making process.

3. Identify family, community and agency level needs

    1) Safe, decent and affordable housing units are an identified need determined by the community needs survey. This is both a family and community level need.
    2) Emergency services to help families pay for utilities (heating/cooling costs) are an identified need determined by the community needs survey. This is a family level need.

3) Early Childhood Education to continue provision of preschool services is an identified need determined by the community needs survey. This is both family and community level need.
4) Transportation for local-demand response is an identified need determined by the community needs survey. This is a community level need.
5) Substance Abuse Services to provide inpatient treatment and education/awareness is an identified need determined by the community needs survey. This is a family and community level need.
6) Health Services are a need identified by the community needs survey and is both a community and family level need.
7) Senior Services to engage seniors to remain active are a need identified by the community needs assessment and represent both a community and family level need.
8) Youth Services to provide recreation and educational opportunities are a need identified by the community needs assessment as a community level need.
9) Nutrition to combat obesity and address food insecurity is a need identified by the community needs assessment as both a family and community level need.
10) Economic/Community Development to improve infrastructure and help families obtain assets is a need identified by the community needs assessment and represents both a family and community level need.
11) Asset development is a need identified by the community needs assessment survey and represents a family level need.

4. Connect the top 3-5 needs prioritized in the Community Needs Assessment (CNA) process.

The top three needs prioritized are connected to the identified needs (listed above) from the 2019-2021 community needs assessment. Prioritized needs: 1) Housing, 2) Substance Abuse Services and 3) Economic & Community Development. These ranked 1st, 5th and 10th respectively from the list of identified needs.

Prioritized Need 1: Decent, safe and affordable housing units (rental and purchase) are a ***family level need.*** The agency is currently addressing this need through the provision of rental units including rental units for seniors. The agency also operates the Self Help housing program (single family new construction) and provides numerous other housing and housing supportive services for residents. The outcome will be that families are able to secure safe and affordable housing.

Goal: Develop/Implement a Community Development Financial Institution (CDFI) to provide mortgages to low-income families.
FY20 Objective: Obtain expertise needed to operate CDFI effectively.
FY20 Strategies: Research Certification Process; Determine leadership to be involved and obtain necessary training; Submit CDFI Application

Prioritized Need 2 – Substance Abuse Services: Substance abuse services is a ***community level need***. The agency is currently addressing this need through the Tri-County Opioid Project which specifically aims to address the systemic needs of the opioid epidemic. Through this project, LIFT CAA is working with community members and organizations to start informative dialogue, build partnerships and plan systemic changes to prevention, treatment, and recovery of individuals affected by this epidemic. LIFT CAA secured a planning grant award from the Health Resource Services Administration and has hired a full time program director to head up the Tri-County Opioid Response project which represents a "first-step" towards addressing the need for substance abuse services. LIFT CAA is currently collaborating with partners to develop a plan of action (needs assessment) aimed at prevention, treatment, etc. which will help with addressing this need at the individual/ family level in the coming year. At this point, the agency will address this need at the community level to identify resources, gaps, and create the substance abuse prevention and treatment plan. The outcomes will be improved community health and reduced morbidity and mortality associated with opioid overdose. LIFT CAA is also working to address this "need" from a prevention standpoint through a Drug Free Community Support project in collaboration with the Choctaw County Coalition. Through this partnership, youth are recruited to be actively engaged in developing and implementing strategies to raise awareness about the prevalence of tobacco (includes vaping) and marijuana use and the associated health, social, physical and other risks. Youth for this project are defined as those in grades 6^{th} through 12^{th} .

Goal: Establish partnerships with area agencies to increase access and awareness to community supportive services.
FY20 Objective: Research and develop strategic plan to address substance abuse issues in our service area.
FY20 Strategies: Research Strategic Plan Guidelines and best practices; Establish committee and sub-groups; Survey sectors within the community for feedback and support

Prioritized Need 3 - Community and Economic Development is a community and family level need determined by the community needs survey. Currently, LIFT CAA provides services such as business lending and supportive services to help individuals/families improve skills with managing their finances. The outcome will be that families achieve self-sufficiency. In FY20 this will be addressed at the family level.

Goal*:* Restructure the construction classroom to enhance participants capacity to achieve self-sufficiency.
FY20 Objective: Research other funding sources that support the expansion of the construction classroom.

FY20 Strategies: Research grant opportunities; Write/Submit grant applications; Determine materials based on need, cost and other key factors.

Agency Level Goal: Establish and implement a new name and logo for the agency in an effort to better convey our mission and services to the public. This is an agency-level goal
FY20 Objective: Research other viable options to name the agency.

FY20 Strategies: Research options for agency name change; Research companies specializing in re-branding process; Determine new agency name and logo.

At the agency level, in order to address each of these needs, LIFT CAA's resource development activities will have a strong focus on securing funds specifically for these purposes. CSBG funds have been budgeted to address Housing and Economic/Community Development needs. LIFT CAA also has numerous existing housing programs and supportive services that will help with achieving the desired outcomes for housing and economic/community development. LIFT CAA operates State Parks, multi-family units and other programs that help to spur the economy. The agency also has long-standing partnerships with Southern Workforce Board, the Choctaw Nation of Oklahoma, Chambers of Commerce, and other stakeholders that will be additional resources in addressing these needs.

Community needs were prioritized by focus groups. The focus groups were made up of agency leadership, front-line staff, program directors, supervisors, planning department staff and Board members. Each individual representing one of these groups completed a survey that listed the top ten needs as ranked by the community. They completed an activity of ranking/prioritizing the top three needs based on their roles in the community as service providers, etc. For each need selected, they were asked to provide an explanation (qualitative data) as to why they selected the needs. Once all focus group surveys were collected, the responses were recorded and prioritized based on counts. Each represents needs to be addressed by the agency. The agency will strive to partner at the local level as well to address these community needs.

5. Has anything changed within your service area or within your agency in the past year that affect the needs from previous years? (provide examples) .

No, the identified and prioritized needs for FY20 are still reflective of the most recent needs assessment. This three-year (2019-2021) Community Needs Assessment Report was approved by the Board of Directors on January 8, 2019.

During this process which has been described in detail, the biggest change was the communities desire to address substance abuse in the area. That need, which was not identified in the prior community needs assessment is now one of the top three community needs.

In addition to the findings leading to this need being supported and addressed during the community needs meetings, there is a significant amount of data from reliable sources that support the community responses. That data is included in the C.N.A. report which is included as an upload to this application.

Research, as well as reports from residents during the community meetings, reflects a slight improvement in the economy which is attributed to economic development within isolated parts of McCurtain County. These communities have a long history of serving as tourist sites, with Broken Bow having a State Park that is visited by thousands of tourists each year. Over the past three to five years, individuals have begun to capitalize on these resources by expanding opportunities for tourists to include construction of cabins and more. This activity has been well received and has spurred creation of small businesses to include gift shops, restaurants, and more. This slight economic boost is also supported in the data/statistics from Department of Labor and other sources. Those sources are also included as uploads to the application within the Community Needs Assessment Report.

6. Describe the process for selecting programs/services administered by the Agency, based upon results of the needs assessment

   The top three needs prioritized from the community needs assessment conducted late in 2018 and subsequently approved by the Board at the January 8, 2019 board meeting were Housing, Substance Abuse Services and Economic & Community Development. The agency strives to locate and secure resources that serve to address the community-identified needs. To that end, leadership seeks and forms partnerships, funding, and volunteers to help with addressing these needs. In addition, CSBG funds are budgeted for these activities especially within the area of housing.

7. Reference resources identified in the CNA and indicate how they will be connected to services in the CAP provided by the agency:

   The agency will continue to refer to the needs assessment as a guide for resource development and continued service delivery. The agency will work with community partners, residents, funders and others to seek out strategies for addressing community needs even if/when they differ from those that can be directly addressed through the agency (based on existing programs and capacity).

   The C.N.A. includes lists of all identified resource providers currently addressing each prioritized need. Staff will collaborate with these resource providers when possible and practical, to address the needs. Referrals to other resource providers will be made to ensure residents are tapping into all potential resources. The agency will seek to not duplicate services but to provide services and address gaps in order to meet the community identified needs.

   As noted in the logic models for 2020, the three prioritized needs which will be the focus for identifying and implementing strategies are: Housing, Substance Abuse Services, and Economic/Community Development.

Planning

This section should be in <u>narrative format</u> and include the following at a minimum:

1. Provide a brief description of the agency's Strategic Planning process and provide dates of the current strategic plan.

   In October of 2019, LIFT CAA began the process to create the new three-year (2020-2023) Strategic Plan. This prIess began with internal reviews and analysis of the existing 2017-2020 Strategic Plan, the current Community Needs Assessment, the 2019 logic models, the performance measurement outcomes spreadsheet, and the Customer Satisfaction survey results from calendar year 2019. In addition, discussion and analysis occurred over program services provided as reported in CAPTAIN.

   The next step in the process involved the ROMA/CAPTAIN/CSBG specialist and the Executive Director meeting with a Certified ROMA Implementer, Julia Teska. This in-person one-day meeting occurred on October 24, 2019. The ROMA Implementer provided training, technical assistance, guidance and support over "next steps" and CSBG mandates as well as ODOC (Oklahoma Department of Commerce) guidance/rules for preparing the agency's new three-year 2020-2023 Strategic Plan. As part of that process, numerous organizational standards and other components were reviewed and discussed.

   On November 12, 2019, the Board of Directors reviewed the 2019 Community Action Plan and the 2019 logic models which identify needs that align with the top three needs from the existing Community Needs Assessment. They also reviewed the 2017-2020 Strategic Plan and were provided updates on the success of specific strategies and progress in meeting stated goals.

   On January 14, 2020, LIFT CAA's Board of Directors engaged in strategic planning activities, including SWOT (Strength, Weaknesses, Opportunities and Threats) Analysis to provide input for the new 2020-2023 strategic plan. During this same meeting, they reviewed the agency's Mission and Vision statements and participated in activities to determine if the existing language met with the CSBG criteria as well as the goals/ objectives of the agency and the needs of the community. Through this activity and subsequent assessment activities with staff, leadership and focus groups, it was determined that the new Strategic Plan will focus on the top three needs as identified in the current 2019-2021 Community Needs Assessment. The 2020-2023 Strategic Plan was submitted to the Board of Directors on February 11, 2020 and was approved during that regularly scheduled meeting.

2. Describe the connection between the CAP and the agency-wide Strategic plan.

   The strategic plan represents a long-term three year plan used by the agency for decision making with identification of short term, intermediate and long term goals. It includes data from the needs assessment and identifies the top 10 needs as well as three specific needs to be addressed over the course of the three years. The CAP plan builds upon the Strategic plan, identifies short-term goals (needs to be addressed and the expected outcomes to be achieved) that the agency will focus on during this fiscal year (2020). Connections between the plans are evident across the needs sections. The need for housing is a constant in both plans, ranking in the top three needs across each. Economic

and Community Development, although different terminology is used, is also a constant across both plans. Substance abuse services, a prioritized need referenced in the CAP plan, is also addressed in the strategic plan. Both plans are very representative of the CSBG goals, mandates, organizational standards and LIFT CAA's mission to address needs that will serve to help individuals/families on the path to self-sufficiency.

3. Submit final logic models with actual results for top three needs for CSBG 2019.

   Final 2019 logic models with Board-approved revisions and results are included as uploads to the application within the Pre-award agency questionnaire upload.

   Evaluate last year's performance (2019) and determine what will be done differently this year.

   The Final Logic Models for 2019 were presented to the Board during the November 12, 2019 Board meeting. Prior to discussing the success of specific strategies identified in the logic models, the Board was asked to consider revisions to the Outcome Indicator section of each logic model to ensure that they aligned with the outcomes as captured through the CAPTAIN software system.

   Following approval, the actual results were presented and represented outcomes/goals that had been achieved up through October 31, 2019. Therefore, two months was still remaining within the year to achieve stated outcomes. Reports pulled from CAPTAIN and other tracking software showed that either the outcomes had already been achieved or the targets would be met by year end (based upon the level achieved at that point).

4. Submit planning logic models for top three needs for CSBG 2020.

   The 2020 logic models are included within the excel document upload titled Pre-Award Agency Questionnaire section of the application.

5. Ensure logic models include clear outcomes that match the top needs of the CNA, strategies match the needs, outcome levels match the levels of the needs, outcome indicators are identified, measurement tools are identified (Utilize ODOC's Logic Model Checklist).

   LIFT CAA utilized ODOC's Logic Model Checklist to ensure that the 2020 Logic models include clear outcomes that match the prioritized needs in the C.N.A. which are Housing, Substance Abuse and Economic/Community Development. The planning logic models are included within the excel workbook uploaded in the application titled Pre-Award Agency Questionnaire.

6. Describe the targeted population to be served.

The target population will be residents of Choctaw, McCurtain or Pushmataha counties of Southeast Oklahoma. The agency will continue to provide the wide array of services available. However, increased efforts to serve the population exhibiting need for one or more of the prioritized needs (housing, substance abuse services and/or economic/community development) will be a primary target audience. Programs/services will target families with low-incomes.

7. Explain how Performance Measurement Outcomes are Set

   Program performance goals are set based on a variety of factors. First and foremost, Little Dixie Community Action Agency, Inc. uses the community needs assessment as a tool and guide to look for opportunities that address the needs as identified by the community. The planning department works with program staff, including leadership, supervisors, front-line and support staff to ensure there is a clear understanding of the programs and outcomes. That information is then written within the planning department but is representative of the data shared by those who operate the programs on the day-by-day basis.

8. Performance Measurement Outcomes spreadsheet - Excel Spreadsheet List of outcomes and outcomes indicators (including partnerships) connected to ALL programs/services/activities. This list should be connected to CNA and Strategic Plan.

   The Performance Measurement Outcomes spreadsheet is included as an upload to the application and is representative of needs identified in the C.N.A. and the Strategic plan. It is included in the excel workbook titled "Pre-Award Agency Questionnaire (see labeled tabs within the workbook).

9. A detailed description of how the agency does or will address the needs of youth in low-income communities through youth development programs

   Little Dixie CAA operates programs that address the needs of youth, such as Head Start, Early Head Start, Early Head Start/Child Care Partnership, Early Learning Centers, YouthFirst, Court Appointed Special Advocates program, Healthy Start, Early Childhood Comprehensive Systems Impact program, YouthBuild and Drug Free Communities Support Program. LIFT CAA will continue to seek funding to expand these programs and to develop additional programs that promote positive youth development.

   Other programs focused on promoting positive youth development include the CASA (Court Appointed Special Advocate) Program which utilizes trained CASA volunteers to be the voice for children in the court system and Healthy Start which serves women as well as infants and toddlers through age two years. Through this program, participants receive services aimed at improving health outcomes of newborns and decreasing infant mortality rates, which in large part, focuses on improving the health and encouraging

healthy lifestyles of the mother. LIFT CAA partners with members from the health community including OBGYN's, nurses and others to achieve the program goals.

More than 600 youth receive direct services through the agency's HS/EHS and Early Head Start/Child Care programs. Eligibility requirements for enrollment in these programs require that a significant percentage of the children enrolled represent households with low-incomes. These children receive educational services that serve to improve not only their cognitive skills but also social and emotional skills. While in the classroom, they receive healthy nutritious meals and snacks.

Through YouthBuild, youth who are considered at-risk (have dropped out of school, are low-income, are in foster care, etc.) are provided opportunities to increase their vocational and educational skills. This occurs through provision of coursework to prepare these youth to take the GED test as well as vocational skills training in the area of home construction. Through a partnership with the Self Help Housing program, the youth provide a service through volunteering at these construction sites while learning the portable skills of home construction. They are also provided opportunities for like skills training and community service/engagement.

LIFT's planning department actively pursues opportunities to implement additional youth-development programs and/or to enhance existing ones. CASA and the mentoring program partners with other youth-oriented entities/programs i.e. Men United; Choctaw Nation of Oklahoma's Youth Advisory Board; Boys and Girls Clubs; Health Department; area Schools; and more to address needs of youth in the community.

10. A description of how the agency coordinates the provision of employment and training activities with The Workforce Innovation and Opportunity Act (WIOA) programs for services.

LIFT CAA does not provide direct employment and training activities. However, the agency works closely with the local workforce board (Southern Workforce Board) for the common goal of helping people obtain their vocational goals.

LIFT's transit program transports residents to and from their jobs; the agency builds into its programs components that serve to improve life skills necessary to sustain employment. The agency also secures partnerships with the local workforce board to strengthen opportunities pursued that serve to address employment and/or barriers to employment such as lack of job skills, etc.

The AmeriCorps program utilizes 20 AmeriCorps volunteers in the Head Start and Early Head Start Classrooms as Individual Development Coaches for the youth. As part of their tasks (working with youth on achievement of goals), they learn early childhood skills that improve their job skills in the process. Also, through the YouthBuild program, a total of 44 youth (ages 16-24) will receive services to include GED preparation and testing as well as vocational skills training relevant to construction. Each of these activities help the youth participants to improve their goals for career development.

In addition, LIFT CAA pursues numerous funding opportunities each year in which partnerships/formal MOU's are entered into with Southern Workforce Board as a coordinated effort to achieve the stated goals. LIFT CAA and SWB have a long standing and good working relationship.

11. A thorough description of how funds will support innovative community and neighborhood-based programs such as fatherhood initiatives, and other initiatives aimed at strengthening families (e.g. Asset Building projects).

    Utilizing the "Strengthening Families Program" curriculum, LIFT CAA's YouthFirst program provides case management services to at-risk youth ages 10 to 17 who reside within Choctaw, McCurtain, or Pushmataha Counties. Youth participants receive support to become productive, law-abiding citizens. Project activities and SFP training work to strengthen the family system, protective factors, pro-social skills and parent-child communication. The program serves 30 at-risk children and their families each year. LIFT CAA's Mentoring, CASA, and Healthy Start programs provide numerous opportunities which encourage family involvement and strengthen the family unit. This is achieved though planned activities and with the help of partners. The At-Risk and Victims Advocacy programs partner with Men United to assist at-risk youth in developing responsibility and learning specific skills through community improvement events. These men also teach and instill in these young people the importance of community awareness and family involvement. They serve as mentors to these youth on any issue they may be facing.

    Head Start and Early Head Start have monthly "Dad's Day" events and other such program activities to encourage and support fatherhood and family initiatives.

    Healthy Start has an incentive component to increase father/dad or father figure involvement. LIFT CAA programs are well represented on the county coalitions and through the coalitions, many activities occur throughout the year with a focus on father and/or overall parental involvement.

    In February 2020, LIFT CAA will partner again with the Choctaw County Coalition to host the annual (third) "Father/Daughter" dance in Hugo, Oklahoma which is located in Choctaw County. This event had to be moved from the Boys and Girls club to the Agriplex in order to accommodate the huge turnout. In excess of 500 attended last year, representing Fathers and their daughters. Community partners, including business, faith-based, community-based and others all work together to make this event possible.

12. A detailed description of the strategy to counteract the condition of starvation and malnutrition. Include a description of the agencies' emergency food provisions plan, and how the agency provides this population with nutritious foods, nutrition education, shopping techniques, assistance in growing your own food gardens, etc.

LIFT CAA currently operates an ongoing program to combat malnutrition and starvation within the state of Oklahoma; the Child and Adult Care Food Program (CACFP). CACFP is an entitlement program that guarantees nutritious meals to children through age 12 who are enrolled in family day care homes. By providing free and low cost food to child care providers, CACFP helps to ensure that children are well fed, able to concentrate, and ready to learn. CACFP reimburses participating day care homes for their meal costs. It is administered by the U.S. Department of Agriculture. Staff members also provide training to ensure providers are up to date on issues concerning child nutrition and development.

In addition, there are multiple Community Nutrition Centers within LIFT CAA's tri-county service area. LIFT CAA's RSVP Program provides volunteers to serve meals to senior citizens on a daily basis.

For the past nine years, LIFT CAA has partnered with International Paper Foundation, civic organizations, residents and other community-based organizations locally to raise funds for the food baskets provided to families during the Thanksgiving and Christmas holiday seasons. On average, more than 50 families receive food baskets annually through these ongoing events which will continue through 2020.

LIFT CAA program staff, during the intake process for any client/potential client that visits any LIFT CAA location, can easily identify if/when an individual/family might qualify for SNAP benefits. In these events, many times the LIFT CAA employee will assist the client with the application process and/or refer them to the appropriate DHS office to complete an application.

LIFT CAA's Healthy Start program staff work with infants and mothers, mothers-to-be, as well as expectant mothers. They help program participants in addressing malnutrition not only through education but also with assistance applying for WIC and through referrals.

Additionally, LIFT CAA secures grant funds through International Paper Foundation, Wal-Mart Foundation and other sources to assist local food banks with restocking food in their pantries. Food items are available to families of low-income. Apartment staff of LIFT CAA's multifamily program assist food banks in Hugo with packaging and distributing food supplies to families in need.

13. A detailed description of the strategy to ensure appropriate emergency services are provided based on the agencies' community needs assessment. Agencies should demonstrate established linkages with other services and organizations to assemble a combination of short-term resources and long-term support.

LIFT CAA has emergency funds available through the Emergency Food and Shelter Program and the LIFT Emergency Fund. These help to address an imminent emergency-situation where a family has found themselves in crisis due to unforeseen/unanticipated circumstances.

The agency acts as the service unit for the Salvation Army activities for all three counties in the service area. Funds raised through the bell ringing campaign which occurs in

November and December each year also serve to assist families in need of emergency services.

LIFT CAA operates a Victims Advocacy program that provides emergency assistance for food, shelter, transportation, clothing and other needs to victims of any crime. CASA provides emergency supplies such as Emergency Kits which include hygiene products, clothing, books and stuffed animals for children; Safe Place/Healing Hearts provides emergency kits, transportation, rent deposits, emergency shelter and assistance with medical needs for victims of Sexual Assault, Domestic Violence, Stalking or Dating Violence.

Provision of emergency services are provided through partnerships with DHS, local Court systems, County Health Departments, County Coalitions, Food banks, Salvation Army and other linkages. This ensures the ability to address emergency needs of individuals and families in the service area.

14. Brief description of how agency will partner with other local entities, including faith-based, charitable and community organizations.

LIFT Community Action Agency, Inc. has numerous partnerships at the community level and beyond. These partnerships are identified in the addendum which has been included as an upload. Partnerships represent faith-based, community-based, public and private organizations, other social-service providers, Choctaw Nation of Oklahoma, Southern Workforce Board and more. Many of the programs operated by the agency would not be sustainable without these partnerships.

LIFT Community Action Agency, Inc. is a member of the county coalitions in each county within the agency's service area. The coalitions represent every sector of the community. Members meet monthly and LIFT CAA is well represented at each meeting. LIFT CAA will continue to partner with other entities/organizations, establishing MOU's when applicable in order to address shared goals to improve the lives of families, especially those with low incomes and to address needs within the service area.

What efforts are in place to avoid duplication of services? (Provide a complete agency partnership list as an addendum to this CAP and list at least one outcome for each partnership – see number 7 for more information. As long as outcomes are clearly identified this list can be used to meet Organizational Standard 2.1.)

Strategies to reduce the duplication of services: Through existing partnerships, attending coalition meetings, active participation in civic and other community-based organizations, etc., LIFT CAA is well aware of the needs of the community and whether or not they are being adequately addressed. LIFT CAA does not "compete" with other organizations locally to address needs, but rather forms both informal and formal partnerships to achieve the shared goals. LIFT CAA is the primary service provider in the tri-county area and the "go-to" agency for most needs aside from those state and federal entities i.e. Department of Human Services, County Health Departments, etc.

The Choctaw Nation of Oklahoma provides some of the same services as does LIFT CAA including Head Start and social service programs. However, this is not considered a duplication of services as most services provided via the Choctaw Nation of Oklahoma are restricted to tribal members.

Many civic, faith-based and charitable entities have representation on LIFT CAA's board of directors and each month, the planning department employees present to the board funding opportunities the agency seeks to pursue (requesting board approval to move forward). During these presentations, employees provide a very detailed description of what services would be provided if/when the grant(s) were to be awarded. This provides an opportunity to discuss any existing programs/entities that may already be providing the service.

Head Start and the ECCS (Early Childhood Comprehensive Systems Impact) programs partnered to update the tri-county resource manual which identifies organizations throughout LIFT CAA's service area of Choctaw, McCurtain and Pushmataha counties and beyond. This manual is located in every Head Start and Early Head Start center. It is also shared with other program staff throughout the agency. This provides a tool not only to help identify resource providers but also to identify potential gaps in service. Referrals are made to other organizations if/when LIFT CAA is unable to address the needs of clients or potential clients. The resource guide index was included in the Community Needs Assessment report along with directions on how/where to access. It is available on LIFT CAA's website at www.liftca.org

15. Describe what success with the CAP will look like.

Success will defined as having achieved at least 75 percent of the stated outcomes as identified in the logic models. Success will also be measured by increased positive feedback from customers as reflected in the customer satisfaction surveys. Success will also involve increased or enhanced services and partnerships that directly address the three prioritized needs (Housing, Substance Abuse Services, and Economic/Community Development. And success will also involve the creation or enhancement of partnerships/collaboration efforts so as to ensure all available resources are being utilized for addressing community needs. LIFT CAA will utilize CAPTAIN and other tracking systems to identify agency staff, board and volunteer training hours to assess agency and stakeholder capacity. Success in terms of agency capacity will equate to sustaining training and volunteer hours at the 2019 levels.

Implementation of Services and Strategies

This section should be in <u>narrative format</u> and include the following at a minimum:

1. Describe how the CAP will be implemented, how staff will be notified/trained and who is responsible for oversight of the plan implementation

The CAP will be shared by email, in paper format, through discussion, etc. with leadership (including Board members), program directors, supervisors, front-line and

support staff. This will ensure that all staff are aware of the expected outcomes identified within the CAP for FY2020 which will be a primary focus of agency activities over the year. It will be discussed in detail with Board members who will all be provided copies. Review and analysis of the CAP will occur on a quarterly basis i.e. through customer satisfaction and outcome reports presented to staff and board. Program Directors will receive monthly reports pulled from CAPTAIN and will be instructed to compare the data to the logic models (if applicable) and to the Performance Measurement goals as identified in the spreadsheets. The CAPTAIN Administrator will notify staff of any concerns in terms of not meeting goals, etc. Leadership, staff and Board all work to achieve stated outcomes with the CAPTAIN Administrator being responsible for oversight of the plan implementation.

2. Describe what case management services are provided by the agency. LIFT CAA operates several programs that provide case management including Lending, Head Start, Early Head Start, Early Head Start-Child Care Partnership, Healthy Start and Housing. Case management is provided to clients seeking loan funds to help them become loan eligible; services would include credit counseling, budgeting, financial coaching, etc.; Case management is provided to parents/primary caregivers of HS/EHS and EHS/CC by Family Advocates working with each family towards setting and achieving goals. Case management is also provided by Housing Coordinators with clients seeking housing services. In the area of housing, case management may involve provision of credit counseling as well as helping families work with creditors to reduce debt (in some cases, having debt written off); budgeting; saving; financial fitness; refinancing home loans to reduce interest rates and more. The housing counselors maintain regular contact with the customers to encourage them and help them "stay on track" so as to increase their chance to improve their current financial situation. The goal is to reduce debt, increase income and become more self-sufficient. Healthy Start clients receive case management through follow up activities provided by the care coordinators to ensure that health screening appointments were kept as well as other activities that serve to support the program goals. Other program participants receive case management via the applicable program staff which serves to facilitate continued participation.

   The new strategy of using the Matrix Questionnaire directly lends itself to case management as customers receive a new questionnaire to complete every 90 days. This allows staff to assess if their situations are improving, or if a referral to an additional program is necessary to promote self-sufficiency. Service Integration Matrix (SIM) will assess if the client is eligible for other services than those originally sought. The SIM is ran internally (CAPTAIN Administrator) on every client served whereas the Matrix is ran on select clients i.e. those receiving services of Credit Counseling, Housing Rental, EHS-CC or Business Lending. Clients for which the matrix is used averages 300.

3. For agencies utilizing CAPTAIN also include a description of how you will utilize the risk assessment report available in CAPTAIN to assist with case management.

In prior years, the risk assessment report was utilized to assist with case management to help determine the needs of each individual/family requesting services. This report helped the case worker identify the services needed and/or the referrals required in order for the individual/family to be provided with all the assistance and services needed. However, CapSystems, in their work to transition CAPTAIN into ROMA NG (next generation) and in their meetings with Commerce and/or CAP agencies decided to build the pre-assessment questions into the client intake screens. Data that was critical to the risk assessment was previously collected to the pre-assessment tab in CAPTAIN. That data has now been integrated into the client intake screens. Currently, LIFT C.A.A. utilizes the Service Integration Matrix (SIM) to assist with case management. The SIM allows CAPTAIN users the ability to provide the client with additional services the client may be eligible for, based on the information reported. CAPTAIN data input staff can print and mail a computer-generated referral letter to the client. If the client is readily available, the letter can be given to them in person. This letter lists the possible services the client is eligible for and the contact information for those programs. By utilizing the SIM feature, LIFT CAA program staff have the opportunity to educate and provide individuals/families with as many services as possible, thus improving customers chances of achieving self-sufficiency." To reiterate, the implementation of the Matrix Questionnaire discussed earlier allows for extended case management with a sample of agency customers via intentional follow up at a minimum of every 90 days.

4. Describe your agency's process for tracking outcomes and outputs.

Employees responsible for data collection/tracking are trained over the FNPI's and SRV codes applicable to the specific services they provide within their programs. They learn how to appropriately and accurately transfer data from client intake forms into CAPTAIN, the primary tool for tracking outcomes across the agency. The CAPTAIN administrator conducts both group and one-on-one trainings to help each CAPTAIN "user" understand how to input data and how to use that data as a tool for decision making. As the CAPTAIN administrator pulls reports on a monthly basis and analyzes that data against projections, etc., she uses that to determine if/when additional training is needed. When issues arise, specialized or one-on-one training is provided to applicable program staff.

Agency-provided programs are required to utilize CAPTAIN for capturing client data, non-client data, staff training; board member training and volunteer hours, etc. This is one method by which the agency is able to track outcomes and outputs. In addition, nearly every program operated by LIFT CAA is required to utilize specific tracking tools as required by their funder. One example would be housing. Housing counselors use two tracking programs; CounselorMax and ORS (online reporting system) to track outputs and capture the outcomes of the services they provide. Head Start, Early Head Start and Early Head Start/Child Care enter data into Child Plus, Teaching Strategies Gold and other tracking systems. There are numerous "tracking" methods that are program specific and required. All programs report on some level in CAPTAIN.

5. A description of how CSBG funds will be coordinated with public/private resources Little Dixie CAA leverages the CSBG funding with other public and private resources to provide adequate funds to operate many of our anti-poverty programs. Programs receiving CSBG support include Court Appointed Special Advocates, Retired and Senior Volunteer Program, Housing, CSBG/CAPTAIN/ROMA administrator, Community Projects, Early Learning Centers, and others as needed. LIFT CAA has used its CSBG funding in a similar manner for many years. CSBG funding helps to support many of the tools (Community Needs Assessment, Strategic Plan, etc.) that help with agency decision making processes. CSBG funds are leveraged with other federal, state, and foundation resources received by the aforementioned programs.

6. A description of how customer satisfaction will be assessed.
   Customer Satisfaction is collected via a Customer Satisfaction Survey. The survey identifies the department from which the customer sought and/or received services. It offers three choices to identify "level of satisfaction which includes: "***Very Satisfied" "Somewhat Satisfied" or "Not Satisfied".*** The survey encourages customers to elaborate and leave feedback for ways the agency could improve upon service provision. The survey also collects demographics i.e. gender, age ranges, race and ethnicity.
   All customer satisfaction surveys, whether completed online or on paper are maintained by the ROMA/CSBG Administrator. She inputs all responses into one database and provides quarterly reports to the Board and leadership on the analysis of the surveys. This includes rate of return by program and county reporting; response percentages on levels of satisfaction, etc.
   When a survey reveals a need for action, the response is immediately forwarded to the appropriate program staff. Customer satisfaction feedback is used in planning and for staff training purposes. Survey responses are helpful in identifying strategies or areas where the agency might could improve and for identifying potential barriers/issues and gaps in services.

Observations of Results and Reporting the Achievement of Results

This section should utilize *Logic Model Templates* and include narrative of the following:

1. Describe the system for data collection and aggregation into reports: Data will be collected by assigned/appropriate data collection staff in each program and for each need identified in the logic models. This data comes from client intake forms and is transferred into CAPTAIN and/or other tracking systems. Data/outcomes will be reviewed monthly by the CAPTAIN administrator. The CAPTAIN administrator shares reports with program staff on a monthly basis and with the Board no less than once per

year. Logic models are included for both FY19 Final and FY20 Planning within the Pre-Award Agency Questionnaire excel workbook (uploaded into OKGrants.

2. Describe how will the information for the CSBG Annual Report (IS) be collected and used by the agency. Information for the CSBG Annual report comes primarily from CAPTAIN reports. The information is used to help better understand who represents the agency's clients; to ensure services are being targeted and provided to the target audiences of individuals/families with low-incomes; as a tool for decision making and planning purposes. The CAPTAIN administrator will share annual report data with leadership, board and staff. Initial data input occurs at the program level by assigned and trained CAPTAIN data entry personnel.

3. Describe how outcome data will be shared across programs (agency wide reporting practices) and with agency leadership (include methods and frequency). Customer satisfaction data will be shared with the Board and ODOC on a quarterly basis and as necessary with staff to address any issues. Program reports will be shared with appropriate staff and program directors on a monthly basis. The data will be used to assess if program goals are being met and identify any barriers or gaps. The SIM feature in CAPTAIN will be utilized for identifying services outside of those sought by clients for which they may be eligible. Outcome data will be shared across programs through presentations and by email so as to ensure that a holistic approach to service delivery is being achieved. Additionally, LIFT CAA recently implemented a strategy to help with assessing the outcomes of service provision, especially within those areas where clients may be receiving more than one service or one service on more than one occasion. Clients receiving services from a select group of programs (Rental Housing, Business Lending, EHS-CC, and Credit Counseling) receive a matrix questionnaire as applicable and no less than every 90 days. The CAPTAIN/ROMA/CSBG Administrator informs applicable staff of which clients need to complete the questionnaire, sends reminders to staff to collect "new" completed questionnaires and using this data, compares it to earlier versions completed to assess whether the client's situation has improved (moved towards self-sufficiency).

4. Describe how the agency's board will be updated on the achievement of the outcomes and the frequency of the updates. *(Organizational Standard 4.4)* Leadership, program directors, front-line staff and others provide reports over one or two programs during each monthly board meeting. The planning director, program planners, ROMA/CSBG/CAPTAIN Administrator, Fiscal Officer, Executive Director, etc. provides updates on logic models, Community needs assessment, Performance Management outcomes, Community Action Plan, Strategic Plan, etc. no less than once per year. The CSBG/ROMA/CAPTAIN Administrator provides reports over customer satisfaction quarterly and updates on achievement of outcomes via the annual report annually.

Analysis of Data and Evaluation

This section should be in <u>narrative format</u> and include the following at a minimum:

1. Describe the data analysis process – what is done, who is involved, etc. The process varies depending upon the year i.e. if it is a strategic planning year, a Community Needs Assessment year, etc. Data analysis is conducted over reports pulled from CAPTAIN on an ongoing basis and typically involves the CAPTAIN administrator, data entry staff and program staff. This level of evaluation is for purposes of understanding reports, any variances within stated outcomes/goals and what is pulled from reports. It begins at the CAPTAIN administrator to Data Entry person level and then goes further to involve front-line staff, supervisors and leadership as necessary. This type of data analysis ensures that data collection over the outcomes is being collected appropriately and occurs monthly. Data analysis and evaluation of the Strategic Plan occurs annually with program staff, leadership and Board. This involves a review of the plan and discussion of any/all known changes within the community that have impacted the plan. Data analysis over the Community Needs Assessment involves stakeholders to include other service providers, residents, customers, staff, leadership, faith-based community, educational community, volunteers, public/private sectors and Board. The formal process occurs once every three years but the plan is updated annually. Customer satisfaction data is collected on an ongoing basis by program staff and forwarded to the CAPTAIN administrator who maintains the surveys and transfers the responses into an electronic database. This data is shared quarterly with Board members and staff. It is shared on an "as-needed" basis with appropriate staff to ensure timely responses/actions for any survey that includes information that is concerning to the agency. Analysis of this data involves looking at the demographics of the survey responses especially the counties and programs from where services were received. This helps with decision making for staff training, need for increased marketing in certain areas, etc.

2. Describe how the agency evaluated last year's performance and what will be done differently based on last year's outcomes/results. Describe how actual results will be compared to projected results? Last year's (2019) performance evaluation began in November of 2019 and started with a review of the logic models. This revealed some errors and discrepancies between what was reported as outcome indicators in the logic models and the actual indicators used and as tracked using the CAPTAIN tools. Agency staff and leadership, the appropriate ODOC staff and the LIFT CAA Board of Directors were informed of the errors and revisions were made to correct those errors. All revisions were approved by both ODOC and the LIFT CAA Board of Directors. The next step was to generate CAPTAIN and other reports to determine if the stated outcomes within the logic models had been met. The revised logic models with results were shared with leadership, front-line staff, directors and the Board. Also, a review by staff over the performance measurement outcomes was completed. This occurred initially with the CAPTAIN administrator, planning director, front-line staff and leadership. Each program was reviewed and Program Directors as well as front line staff provided updates as to challenges, opportunities, etc. that were faced by their respective programs. The

Planning Director and the CAPTAIN Administrator held several in-depth discussions with program staff to determine if all outcomes that can be captured were being captured and if any additional data needed to be added for tracking. This is considered "Program Level Evaluation." Evaluation analysis reports over program outcomes were provided to the board as trainings in September and November of 2019 by the Planning Director. The only significant change will be the tracking of customers using the Matrix Questionnaire. This will occur within the Housing department and the Early Head Start-Child care program. This tracking will allow for increased case management with approximately 300 clients and hopefully serve to support the hypothesis that services provided by LIFT CAA are positively impacting the lives of those we serve and leading to self-sufficiency. This type of data evaluation between leadership, staff and board is an ongoing process. Based on performance and the processes in place which are working for evaluating outcomes, the agency is not proposing any other changes.

3. Describe how the outcomes (actual results) will be used to make changes to the Community Action Plan and the Strategic Plan. The outcomes (from monthly reports pulled from CAPTAIN, Customer Satisfaction and other reporting software) will be used as a tool for gauging success rates and making revisions, if necessary, to the Community Action Plan and the Strategic plan throughout the year. Revisions will only be made following a thorough review by staff, leadership and with Board approval. In the event revisions occur, those would be included to the appropriate documents as "addendums" and the revised plans would be forwarded to staff, board, and the appropriate ODOC staff.

4. Describe how other comparisons (e.g. the demographics of the population served with the population identified to be in need in the CNA) will be done. LIFT CAA's Community Needs Assessment identified that the service area and area assessed are one in the same. While the primary target audience includes families with low-incomes, many agency programs are available across various income ranges. LIFT CAA will utilize the Annual Report which includes demographics on those receiving services to compare to the demographics of the service area as reflected from the CARES network, Community Commons, and Census data. This data will help to identify if the population being served is representative of the community "in need." Given the high incidence of poverty in the service area, LIFT CAA does not expect to see any significant variances.

5. Describe how recommendations will be made to the board regarding actions to be taken based on analysis. Recommendations for change/revisions, if deemed necessary, will be presented to the Board during a regularly scheduled board meeting and will require discussion, review, consideration and a vote by the board prior to any changes. In the event an action i.e. change in needs focus were to be proposed, all stakeholders would be provided an in-depth analysis as to why that action was proposed. Only after careful consideration and analysis would any recommendations for such actions be requested.

6. Describe how the agency will adjust performance goals when needed as evidenced by actual performance. Performance goals will be revised based on actual results if/when there exists a significant variance between the two. Again, this would only occur after a thorough review/analysis to determine why the variance exists. If actual results are lower than goals, an analysis of outreach efforts, staffing, and any other causes leading to the variance would be thoroughly reviewed prior to adjusting the goals. This type of analysis could reveal there is simply a need to increase marketing of a specific program etc.

   Should the actual results be greater than the stated goals, then a review/analysis will be conducted to determine contributing factors. This review may reveal that additional funding was secured for a particular service or staff had undergone some specialized training allowing them to improve performance, etc. Adjusting the goals then would be based on knowledge and/or expectations as to whether the conditions present i.e. increased funding were expected to remain a constant. If so, goals would be adjusted accordingly to better align with expected outcomes.

   LIFT CAA's performance goals are set by program staff and leadership who have knowledge of funding, staffing, need, customer base, etc. Given all the consideration that goes into the goal setting on the front end, the actual results have historically aligned well with the projections. However, conditions change and review and analysis provide the opportunity to explore those changes and adjust accordingly. Any/all changes will be approved at each level to include program staff, leadership and Board.

Attach a copy of the agency's ROMA Implementation Plan (to be considered as a part of the Community Action Plan, and further documentation of Organizational Standard 4.3)**.**

The ROMA Implementation Plan template with dates, persons responsible, etc. has been uploaded in OKgrants as a separate document within the Agency Pre-Award Questionnaire excel workbook.

Submit as part of addendum for Community Action Plan:

Provide Partnership list and list at least one outcome for each partnership. This list should include informal and formal partnerships (those with official memorandum of agreement/understanding). Note if any agreement establishes a newly coordinated service delivery system.

The partnership list has been uploaded in OKgrants in excel format and was pulled from CAPTAIN.

2020 ROMA LOGIC MODEL (Planning)							
Organization: Little Dixie Community Action Agency, Inc.					**Program:** Housing		☑ Family ☐ Community ☐ Agency
Need	**Service/ Activity**	**Outcome**	**Outcome Indicator**	**Results***	**Measuresment Tool**	**Data Source, Data Collection Procedures, Personnel (Where, How, Who)**	**Frequency of Data Collection and Reporting**
Our community has a lack of safe, decent and affordable housing structures in our community. This is a family level need	Participate in training and technical assistance provided by NWA, et.al. to obtain expertise needed to operate Community Development Financial Institution (CDFI).	Obtain funding for CDFI providing resources to make affordable home loans to families in service area.	2 of 2 (100%) applications submitted for CDFI will be awarded.		CDFI Applications submitted by Little Dixie Housing Director and Loan Officer	Data Collection Procedures: LDCAA Housing Director and Loan Officer will submit applications to the Department of Treasury - CDFI.	Data Collection will occur continuously as LDCAA staff prepare and submit CDFI Pre-Application and CDFI Full Application.
Mission: *To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency.*						**Proxy Outcome:**	
*Actual results are only entered into this column AFTER services are provided; however, you can use this column to record projected success rates if desired, and later replace them with actual results.							
		ROMA Logic Model from the National Peer-to-Peer ROMA Training and Certification Project					
		https://nascsp.org/wp-content/uploads/2018/02/NPtP-Logic-Model.pdf					

2020 ROMA LOGIC MODEL (Planning)							
						☐ Family	☑ Community ☐ Agency
Organization: Little Dixie Community Action Agency, Inc.					**Program:** Substance Abuse		
Need	**Service/ Activity**	**Outcome**	**Outcome Indicator**	**Results***	**Measuresment Tool**	**Data Source, Data Collection Procedures, Personnel (Where, How, Who)**	**Frequency of Data Collection and Reporting**
Our community has a need for additional substance abuse treatment resources and supportive services. This is a community level need	**Short Term:** Conduct community level research in collaboration with partners to develop strategic plan to address substance abuse issues in our service area.	Knowledge of substance abuse resources; gaps in services and identified strategies to be undertaken to combat the need is achieved.	10 of 22 (45%) of community partners will agree to promote awareness of strategic plan in their agencies.		Tri-County Opiod Program Director will work with area partners to identify strategies and develop a strategic plan to combat substance abuse.	Tri-County Opioid Program Director will document work with community partners to seek to raise community awareness about existing resources and to identify strategies to include in the strategic plan.	Tri-County Opioid Program Director will provide a report to the board and leadership to be shared with stakeholders no less than annually.
Mission: *To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency.*						**Proxy Outcome:**	
*Actual results are only entered into this column AFTER services are provided; however, you can use this column to record projected success rates if desired, and later replace them with actual results.							
		ROMA Logic Model from the National Peer-to-Peer ROMA Training and Certification Project					
		https://nascsp.org/wp-content/uploads/2018/02/NPtP-Logic-Model.pdf					

2020 ROMA LOGIC MODEL (Planning)							
						☐ Family	☑ Community ☐ Agency
Organization: Little Dixie Community Action Agency, Inc.					**Program:** Economic/Community Development		
Need	**Service/ Activity**	**Outcome**	**Outcome Indicator**	**Results***	**Measuresment Tool**	**Data Source, Data Collection Procedures, Personnel (Where, How, Who)**	**Frequency of Data Collection and Reporting**
Our community has a need for increasing workforce related skills to improve self-sufficiency. This is a community level need	**Short Term:** Research funding sources and submit applications for resources to expand the YouthBuild construction classroom.	One (1) YouthBuild construction classroom expanded.	1 of 2 (50%) applications submitted for expansion of construction classroom is awarded.		Number of Construction Classroom expansion funding applications submitted by Little Dixie staff.	Data Collection Procedures: LDCAA staff will submit applications.	Data Collection will occur continuously as LDCAA staff prepare and submit construction expansion applications.
Mission: *To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency.*						**Proxy Outcome:**	
*Actual results are only entered into this column AFTER services are provided; however, you can use this column to record projected success rates if desired, and later replace them with actual results.							
		ROMA Logic Model from the National Peer-to-Peer ROMA Training and Certification Project					
		https://nascsp.org/wp-content/uploads/2018/02/NPtP-Logic-Model.pdf					

2020 ROMA LOGIC MODEL (Planning)							
						☐ Family	☐ Community ☑ Agency
Organization: Little Dixie Community Action Agency, Inc.					**Program:** Agency - Rebranding		
Need	**Service/ Activity**	**Outcome**	**Outcome Indicator**	**Results***	**Measuresment Tool**	**Data Source, Data Collection Procedures, Personnel (Where, How, Who)**	**Frequency of Data Collection and Reporting**
Our agency has a need to restructure and rebrand ourselves to better enhance our ability to fight poverty and promote self-sufficiency. This is an agency need.	**Short Term:** Research other viable options to name the agency. Conduct surveys among staff, board, community members and stakeholders (funders, etc.)	Obtain new agency name and logo.	4 of 4 (100%) of name change steps completed by the time additional funding sources become available.		Executive Director will work with internal staff and re-branding agency to obtain new agency name and logo.	Executive Director will hold meetings with key leadership staff and board of directors, community members, stakeholders, etc. to determine new name of agency and logo.	Executive Director will report no less than quarterly to the board on progress on the agency's name change.
Mission: *To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency.*						**Proxy Outcome:**	
*Actual results are only entered into this column AFTER services are provided; however, you can use this column to record projected success rates if desired, and later replace them with actual results.							
		ROMA Logic Model from the National Peer-to-Peer ROMA Training and Certification Project					
		https://nascsp.org/wp-content/uploads/2018/02/NPtP-Logic-Model.pdf					